

SCREEN LOCAL FILED TAX RETURNS - TAX YEAR 2017

Effective Date

01/01/2018

Overview

"Local File" localities are responsible for screening designated tax returns filed with their office. Screening is performed to ensure that the tax return is complete and necessary information for data capture and processing is provided. This process includes the screening procedures for the **Tax Year 2017**, Individual Income Tax forms listed below.

- Form 760 - Individual Income Tax Return (760 Handprint and 760CG)
- Form 760PY - Part-Year Resident Individual Income Tax Return
- Form 763 - Nonresident Individual Income Tax Return
- Form 763-S - Virginia Special Nonresident Claim for Individual Income Tax Withheld
- Form 770 - Virginia Fiduciary Income Tax Return

This process does not pertain to the Category 7 returns, which are to be processed by TAX as "**Direct File**". Please refer to TASK: [Open and Sort Mail](#)

A locality is referred to as either "Direct File" or as "Local File" in relation to screening. The screening tasks in this process are performed by "Local File" localities. A "Direct File" locality accepts tax returns for transmittal to TAX **without** performing local screening tasks.

Tasks

[General Screening of Individual Income Tax Returns - Tax Year 2017](#)

[Screen Form 760 - Tax Year 2017](#)

[Screen Form 760PY - Tax Year 2017](#)

[Screen Form 763 - Tax Year 2017](#)

[Screen Form 763-S - Tax Year 2017](#)

[Screen Form 770 - Tax Year 2017](#)

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